

# CALIFORNIA ECONOMIC BASE REPORT: CENTRAL COAST REGION



Prepared for the



DECEMBER 2006

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## **California Economic Strategy Panel**

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## PREFACE

The bipartisan California Economic Strategy Panel (Panel) was established in 1993 to develop an overall economic vision and strategy to guide public policy. The Panel engages in an objective and collaborative biennial planning process that examines economic regions, industry clusters, and cross-regional economic issues. The 15-member Panel is comprised of eight appointees by the Governor, two appointees each by the California Senate President Pro-Tempore and the California Assembly Speaker and one appointee each by the Senate and Assembly Minority Floor Leaders. The Secretary of the California Labor & Workforce Development Agency serves as the Panel Chair.

The California Regional Economies Project is currently the lead research mechanism for the Panel to identify economic policy issues. The project provides the state's economic and workforce development systems with data and information about changing regional economies and labor markets. The information provides a new resource in economic and workforce development planning and a bridge connecting economic and workforce policies and programs at the state and regional levels.

Since 1996, the Panel recognized the rapidly changing nature of the California economy and its economic regions. In order to understand the state's economy and the changes taking place within industry sectors and industry clusters, it is important to recognize the regional nature of the economy and to analyze the economic base by region. To do this, the statewide and nine regional economic base reports analyze the patterns of employment, business establishments, wages, population, unemployment rate and other key factors.

This report presents a statewide overview and comparative analysis of the nine regions from 2001 to 2004. Also, in-depth economic base reports for each region are available. The previous economic base reports examined the 1990-2002 period, and were the first economic base reports for the regional economies as they are defined today. The Panel's initial work, from 1994-1996, resulted in identification of six regions and provided regional economic base analyses; however, those regions had been significantly redefined by 1998, making comparisons to the early analyses impractical.

The source of the data used for these reports is the official employment and wage information reported by employers to the State. While a variety of other sources provide similar information, they may not capture the official numbers that employers report, or may not include input from all employers. This data source is the most comprehensive and accurate source of information direct from employers, and is therefore the best to use for public policy-making, planning and program administration.

The Panel has taken steps to institutionalize the analysis and preparation of these economic base reports within State government so that this analysis may be provided on a yearly basis. Also, steps have been taken to leverage the body of knowledge that

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now exists around the study of industry clusters, gained through the California Regional Economies Project.

First, a non-confidential version of the data series, the *California Regional Economies Employment Series*, has been made available online by the California Employment Development Department's Labor Market Information Division so that regional organizations may access this data at the county level. Second, a step-by-step guide, the *Clusters of Opportunity User Guide*, is available online so that regional organizations can conduct industry cluster studies and work with business and industry to test and apply the findings. With this information, regional organizations may conduct their own economic base and industry cluster analyses down to the county level, and they may combine county data to create their own sub-regional study areas. Training workshops have been held to teach the methodology and processes outlined in the *Clusters of Opportunity User Guide* to representatives from local and regional organizations including Local Workforce Investment Boards, economic development organizations, and community colleges.

The statewide and regional economic base reports, the *Clusters of Opportunity User Guide* and other studies are available on the Panel's website at <http://www.labor.ca.gov/panel/>.

The *California Regional Economies Employment Series* is available online at <http://www.labormarketinfo.edd.ca.gov/cgi/databrowsing/?PageID=173>.

The California Regional Economies Project is sponsored by the California Labor & Workforce Development Agency, California Employment Development Department, and California Workforce Investment Board.

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## TABLE OF CONTENTS

PREFACE .....	3
INTRODUCTION .....	6
THE CENTRAL COAST REGION.....	8
THE ECONOMIC BASE.....	9
THE FOOD CHAIN.....	14
CONSTRUCTION .....	17
WHOLESALE TRADE .....	20
RETAIL TRADE .....	23
PROFESSIONAL, SCIENTIFIC, TECHNICAL & MANAGEMENT SERVICES.....	25
ADMINISTRATIVE, SUPPORT & WASTE SERVICES .....	28
HEALTH SCIENCES & SERVICES .....	30
ENTERTAINMENT & TOURISM.....	33
ALL GOVERNMENT .....	36
 APPENDIX A: Definition of Industry Sectors and Clusters by NAICS Codes .....	 38

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## INTRODUCTION

The California Regional Economies Project provides data and information about changing regional economies and labor markets. The information provides a new resource in economic and workforce development planning, and a bridge connecting economic and workforce policies and programs at the state and regional levels.

In order to understand the state's economy and the changes taking place within industry sectors and industry clusters, it is important to recognize the regional nature of the economy and to analyze the economic base by region. To do this, the statewide and nine regional economic base reports analyze the patterns of employment, business establishments, wages, population, unemployment rate and other key factors.

This report presents an in-depth analysis of the Northern Sacramento Valley Region's economic base from 2001 to 2004. The previous economic base report examined the 1990-2002 period. The statewide and eight other regional economic base reports are also available at <http://www.labor.ca.gov/panel/>.

### Data Sources

The Quarterly Census of Employment and Wages (QCEW) data is the source for the private industry data, which uses the North American Industry Classification System (NAICS) coding system. The Current Employment Statistics (CES) data is the source for all levels of government employment data. The CES data does not offer wage information, so the government wage information in this report was taken from the federal Bureau of Labor Statistics (BLS) QCEW non-confidential data available online. A more detailed explanation of the data sources is available in the statewide report.

### Industry Clusters versus Sectors

An industry sector is a group of firms that are doing the same type of work, making the same type of products, or providing the same types of services. Examples include manufacturing, construction, retail trade and health care.

An industry cluster is a group of interdependent industry sectors characterized by competing firms and buyer-supplier relationships, as well as shared labor pools and other specialized infrastructure. They are also geographically concentrated. When identifying "industry clusters of opportunity," the Project adds additional considerations that focus on employment opportunities for regional residents.

### Definition of the Economic Base Industries

Economists divide industries into two groups; export-oriented and local-serving (also referred to as population-driven). Export-oriented industries are industries that sell a large portion of their goods and services to people and businesses in markets outside of the region, creating capital (bringing capital into) the region. Local-serving industries are industries that sell their

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goods and services to people and businesses in markets within the region. These industries do not typically create new capital for the region, but recirculate it within the region.

In the previous economic base reports completed in 2004, the two principal researchers who provided the analyses did not agree on a common definition of an area's economic base. One favored the traditional approach, while the researcher analyzing the rural regions felt that there were key local-serving industries that were critical to these regions and should be included in the economic base.

For the current economic base reports, we have chosen to include some industries in our definition of the economic base that are not traditionally included. We do this in part due to the transformations taking place within the industries or regions, and also in recognition of the importance of industries that provide significant employment opportunities for the region, including some high-wage/high-demand sectors and clusters that would otherwise not be included.

While the traditional discussion of an economic base is still the one most used by economists, we feel the other perspective better fits the nature of the California Regional Economies Project, which constantly views the economy in new ways and from new perspectives in order to see transformations taking place. We acknowledge that this use of the term, "economic base," conflicts with the standard definition, and that we are choosing to redefine it for the purpose of these reports. We respect that some will disagree with our use of the term in this way; however, this should not detract from the important economic information presented in the reports. The current reports begin to address the differences in the definition of the regions' economic base industries, which began with the first economic base reports. We plan to revisit this issue again in the future.

A detailed discussion of the definition of the economic base and the differences between the previous and current reports is available in the statewide report.

Definitions by NAICS code for all of the industry sectors and clusters in the statewide overview and regional economic base reports may be found in Appendix A.

## THE CENTRAL COAST REGION



The Central Coast Region includes three counties — Monterey, San Luis Obispo and Santa Barbara. This region accounts for just over 3% of California's jobs and 3% of its population. The region's unemployment rate in 2005 was 5.4%, equal to the state average.

From 1990 to 2003, the Central Coast Region experienced job growth of 20.5%, as reported in the first economic base report. Since the recent recession, from 2001 to 2004, job growth has continued, increasing by 2%. During this time, private industry jobs increase by 2.3% and Government jobs increased by just 0.3%.

### Characteristics of the Central Coast Region

(Numbers are in thousands, except for dollar amounts)

	Central Coast	California	Central Coast as % of CA
Population (2006)	1,110	37,172	3%
Labor Force (2005)	557	17,696	3%
Unemployment Rate (2005)	5.4%	5.4%	100%
Manufacturing Jobs* (2004)	26.8	1,507.8	2%
Per Capita Income (2004)	\$ 34,329	\$ 35,219	97.5%
Average Wage (2004)	\$ 33,302	\$ 43,724	76%

Source: Jobs, Labor Force, Unemployment Rate and Average Wage – California Employment Development Department, Labor Market Information Division; Population and Per Capita Income – U.S. Bureau of Economic Analysis

\* Manufacturing Jobs reported here are traditional production jobs (NAICS 31-33).

Entrepreneurship plays a critical role in regional economic development in rural California. It has been the key to increasing the number of establishments in rural regions, as opposed to established businesses moving or expanding into the region, according to the study, *Patterns of Entrepreneurship in Rural California*. The study also showed that the total number of establishments grew by about 18% between 1990 and 2003 across all of the rural regions. (Growth for the Central Coast Region alone was not cited in the study.)

During the period 2001-2004, the Central Coast Region reported a net increase of over 2,500 private industry establishments (up 8.5%), from 29,700 to 32,200 total establishments. The industry sectors reporting the greatest increase in number of establishments were Private Households, Professional, Scientific, and Technical Services, Ambulatory Health Care Services (led by Offices of Physicians), Construction of Buildings (led by Residential Building Construction), Specialty Trade Contractors, Real Estate, and Food Services & Drinking Places.

## THE ECONOMIC BASE

The economic base is traditionally considered to be made up of export-oriented industries in the study area - industries that sell a large portion of their goods or services to people and businesses in markets outside of the area. For the purpose of this report, we have chosen to include industries in our definition of the economic base that are not traditionally included. We acknowledge that our definition of the economic base differs from standard practice. We do this in part due to the transformations taking place within the industries or region, and also in recognition of the importance of industries that provide significant employment opportunities for the region, including some high-wage/high-demand industries that would otherwise not be included.

Economic base reports also typically look only at industry sectors; however, this analysis will also include industry clusters, where studies by the California Regional Economies Project have defined clusters that provide significant employment for the region<sup>1</sup>.

The criteria for selecting the components of the economic base include the top job providers in 2004, those industries with a high growth rate from 2001 – 2004, and the top job generators from 1990 to 2002, as identified in the previous economic base report. In those cases where industry clusters are examined beginning with the 2001-2004 period, direct comparisons may not be possible with the findings from the first economic base report.

Based on these criteria, the industry clusters and industries included in the Central Coast Region's economic base for this analysis are the following<sup>2</sup>, listed by NAICS code:

- The Food Chain
- Construction
- Wholesale Trade
- Retail Trade
- Professional, Scientific, Technical & Management Services
- Administrative, Support & Waste Management Services
- Health Sciences & Services
- Entertainment & Tourism
- All Government

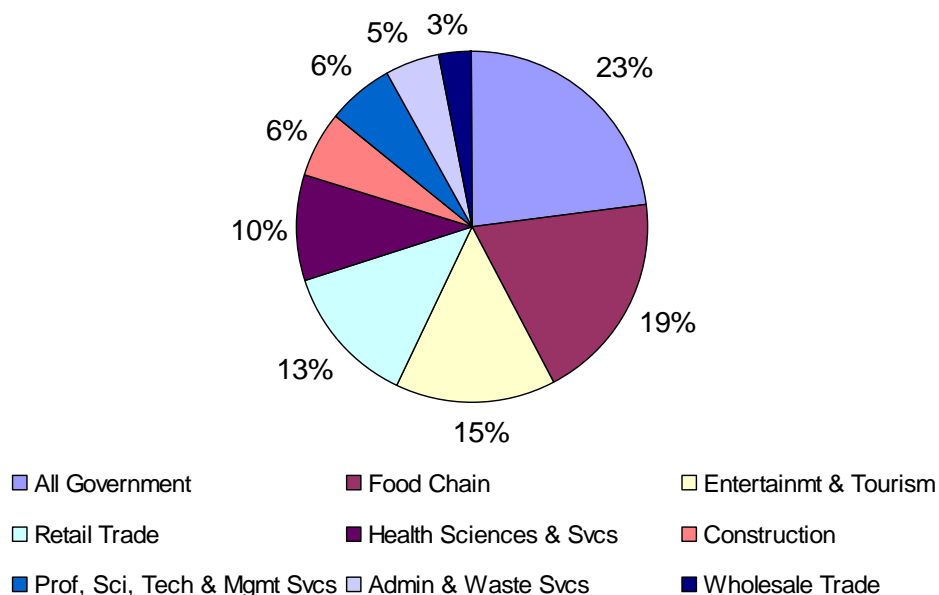
The total jobs reported by the economic base industries and clusters represent 82.5% of the region's total jobs. From 2001-2004, economic base employment grew by almost 14,200 jobs, or 4%.

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<sup>1</sup> Industry Clusters of Opportunity are defined by the California Regional Economies Project as geographically-concentrated, and interdependent industry sectors characterized by competing firms and buyer-supplier relationships, as well as shared labor pools and other specialized infrastructure. In addition to export-oriented sectors, they also include population-driven sectors as well as sectors that offer occupations with career potential.

<sup>2</sup> See Appendix A for a complete listing of all sub-sectors included in the economic base industries and industry clusters.

### Composition of the Central Coast Region Economic Base 2004



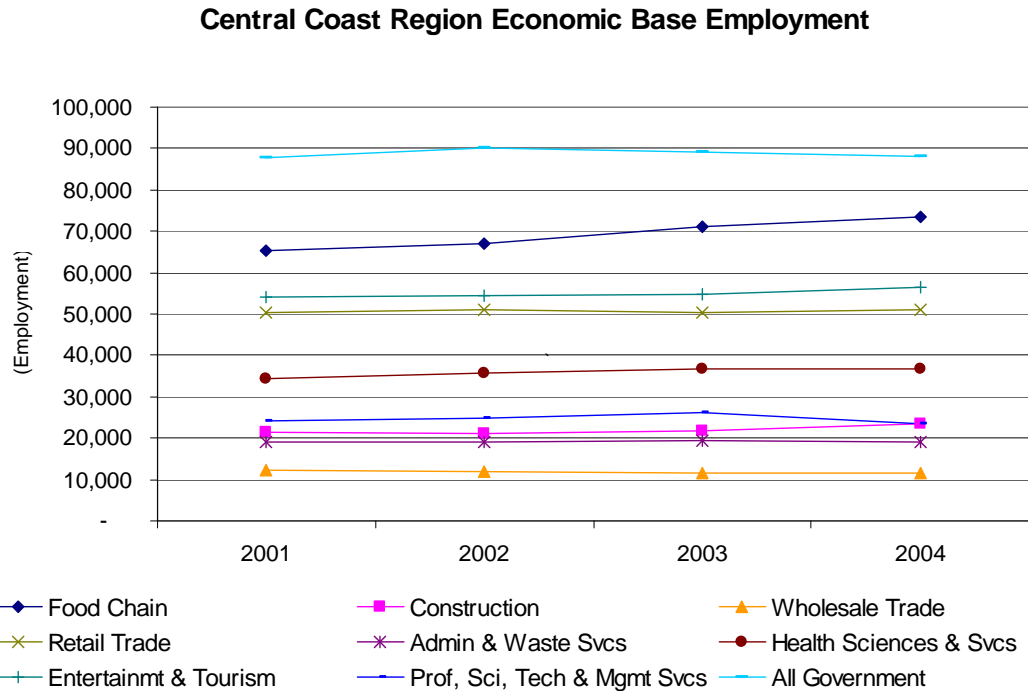
*(Industries are listed in order as they appear in the chart, reading left to right across columns.)*

All Government continues to provide the most jobs for the region, with 88,000 jobs in 2004. This represents over 23% of the economic base jobs, and over 19% of the region's total jobs. The Food Chain was second, with 73,400 jobs; over 19% of the economic base, and 16% of all jobs in the region.

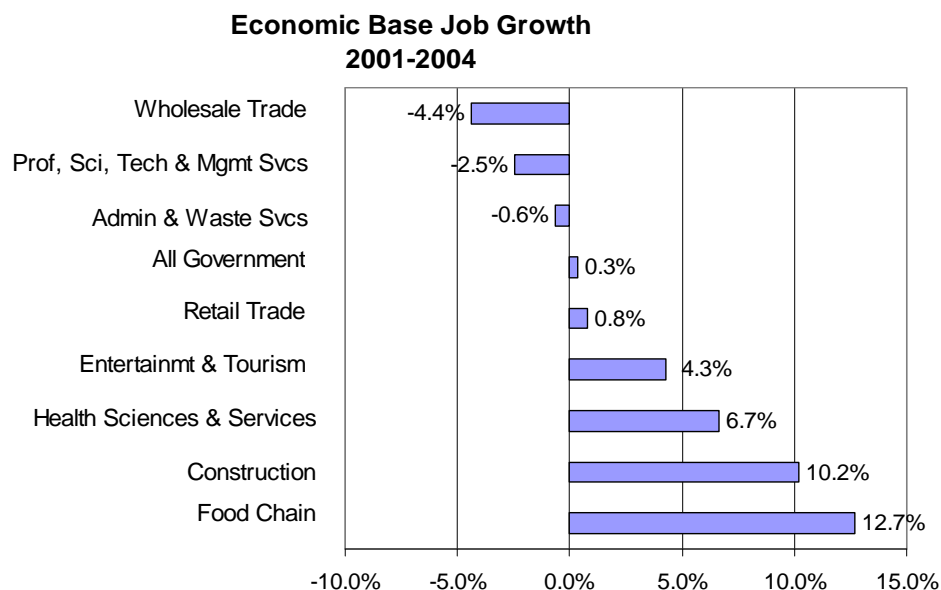
Entertainment & Tourism was the third largest component of the economic base, with 56,600 jobs in 2004; 14.8% of the region's economic base jobs. This was followed by Retail Trade, reporting 50,900 jobs (13.5% of the base); Health Sciences & Services, with almost 36,800 jobs (almost 10% of the base); and, Construction, with over 23,600 jobs (over 6% of the economic base).

The remaining industries in the economic base are Professional, Scientific, Technical & Management Services, which provided almost 23,500 jobs, over 6% of the economic base; Administrative & Waste Services (19,100 jobs), 5% of the economic base; and, Wholesale Trade (almost 11,700 jobs), 3% of the economic base.

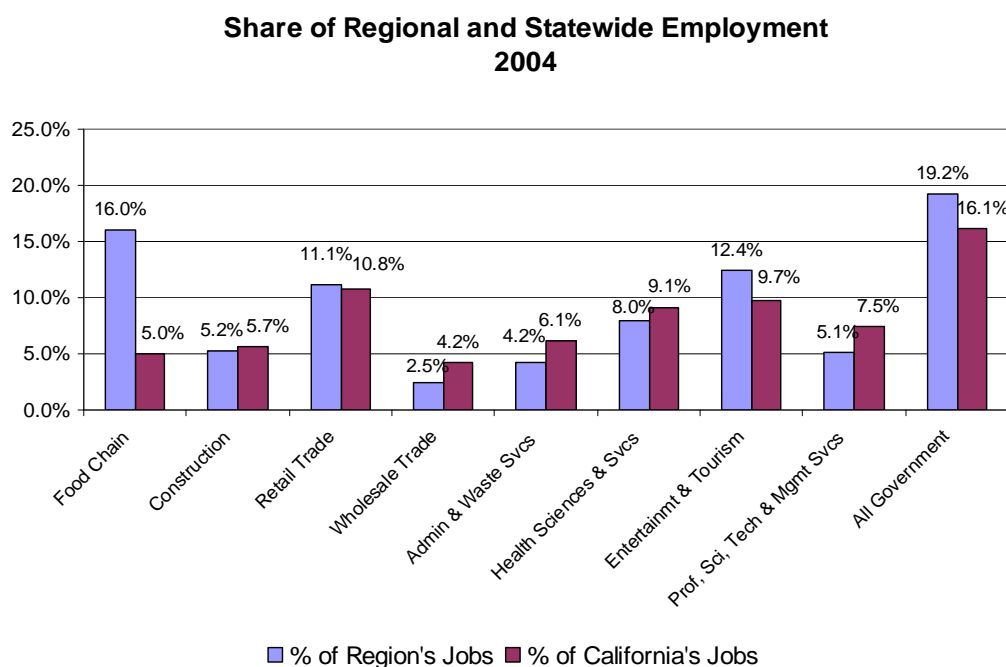
The following graph shows employment for the economic base industries and clusters from 2001-2004:



In addition to size, another important measure is job growth. From 2001-2004, six industries and clusters in the economic base reported job growth. Listed by percentage growth, these include The Food Chain (up almost 13%); Construction (up 10%); Health Sciences & Services (up almost 7%); Entertainment & Tourism (up 4%); Retail Trade (up almost 1%); and, All Government (up just 0.3%). The remaining industries reported job losses for the period.



Another factor to consider is the concentration of an industry within a region – the percentage of the region’s jobs that the industry provides – and also how this compares to the concentration within the state or nation. The following graph compares the concentration of the leading employment sectors in the region to the statewide concentration.



The average annual wage<sup>3</sup> for all industries in the Central Coast Region is \$33,302. This region ranked fifth in the overall average wage, of all nine regions. Within the region’s economic base, the average annual wage by industry and cluster ranges from a high of \$56,742 for Professional, Scientific, Technical & Management Services jobs, to a low of \$17,928 for Entertainment & Tourism jobs. (Wages for the All Government industry are not available.)

The Professional, Scientific, Technical & Management Services industry reports the highest average wage but provides only 6% of the jobs in the region’s economic base. Entertainment & Tourism reported the lowest average wages and provides 15% of the economic base jobs.

Professional, Scientific, Technical & Management Services also reported the greatest (percentage) increase in average wages from 2001 to 2004, rising over 21%, from \$46,783 in 2001 to \$56,742 in 2004. The industry or cluster reporting the least change was The Food Chain cluster, increasing by about 7% during this period; the industry provides 19% of the economic base jobs.

<sup>3</sup> The average annual wage is calculated by dividing the total wages by the total employment (both figures are reported by the employers); the wages and employment data reported do not distinguish between part and full time hours or overtime hours worked. This statistic provides good information for making comparison and tracking trends; however, it may not be the best resource available for employers or researchers and service providers to use when determining a competitive or typical pay scale for employees in a particular industry and/or region.

The following table provides the average annual wage for each industry and cluster in the region's economic base, and compares these to the statewide averages. It also shows the percentage of the economic base jobs that each industry/cluster provides, to point out the percentage of jobs in the higher and lower paying industries/clusters.

<b>Average Annual Wages 2004</b>	<b>Statewide</b>	<b>Central Coast Region</b>	<b>% of Region's Economic Base Jobs</b>
ALL INDUSTRIES	\$ 43,724	\$ 33,302	
Food Chain	31,939	26,813	19%
Construction	43,707	41,330	6%
Wholesale Trade	28,546	46,557	3%
Retail Trade	28,546	26,180	13%
Prof, Scientific, Tech. & Mgmt Services	71,904	56,742	6%
Admin & Waste Services	28,923	27,151	5%
Health Sciences & Services	49,205	43,340	10%
Entertainment & Tourism (Rural)*	20,802	17,928	15%
All Government	47,835	44,980	23%

\* The definition of the Entertainment & Tourism industry differs from urban to rural regions, for the purpose of this report. For urban regions, Entertainment & Tourism combines Arts, Entertainment & Recreation with Accommodation and Motion Picture & Sound Recording Industries; it does not include Food Services. For rural regions, Entertainment & Tourism combines Accommodation & Food Services with Arts, Entertainment & Recreation; it does not include Motion Picture & Sound Recording Industries. For the statewide analysis, the Entertainment & Tourism industry combines Accommodation & Food Services with Arts, Entertainment & Recreation, and also includes Motion Picture & Sound Recording Industries.

\*\* Government average annual wages include the wages for a broad spectrum of jobs, including elected officials and executive branch, judicial, defense, law enforcement, firefighting, education and other public administration jobs. The source for this data is the Bureau of Labor Statistics (BLS) online QCEW data, as the CES data used for the government employment numbers does not include wage information. Wage data for some counties was suppressed.

The remainder of this report discusses each economic base industry or cluster in further detail.

## THE FOOD CHAIN

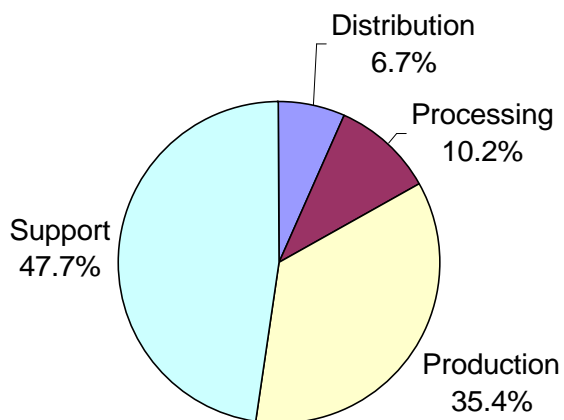
The Food Chain cluster has been defined by the California Regional Economies Project as including not only Production sectors, but also Support, Processing and Distribution sectors. The previous economic base report only looked at agriculture as a part of the Resource Based industries. This report will instead look at the Food Chain cluster.

The Food Chain cluster provides 19% of the economic base jobs for the Central Coast Region, and 16% of all jobs in the region.

From 1990-2002, the Agriculture, Forestry, Fishing & Hunting industry reported strong job growth, adding 12,200 jobs, with 57,400 jobs in 2002.

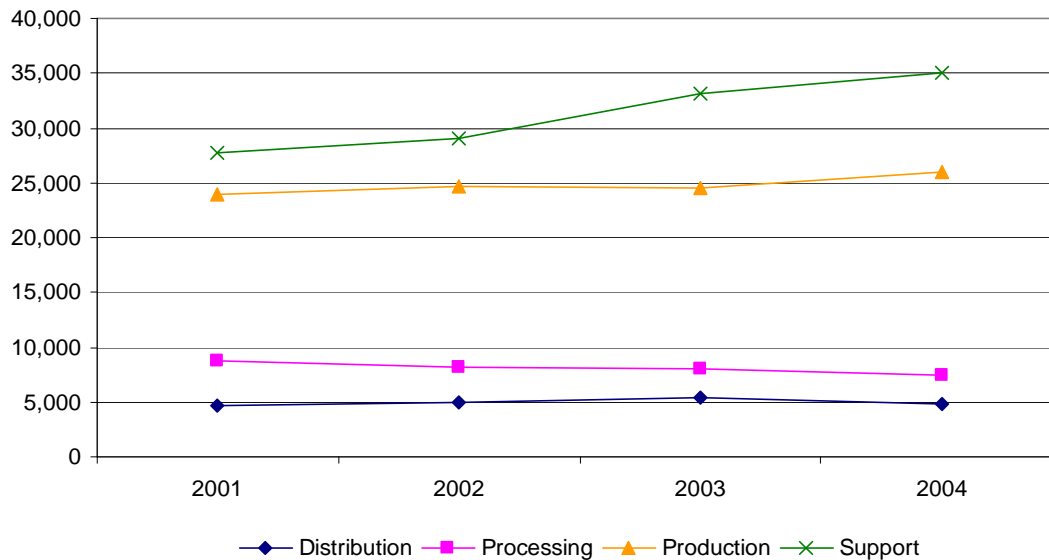
For the 2001-2004 period, the Food Chain cluster reported job growth of almost 8,300 jobs, or almost 13%, growing from almost 65,200 jobs in 2001 to over 73,400 jobs in 2004. In 2004, Support represented almost 48% of the cluster; Production represented over 35%; Processing represented 10%; and, Distribution represented almost 7%.

**The Central Coast Region Food Chain  
2004**



From 2001-2004, three of the four components reported job growth. Support reported the greatest growth, adding almost 7,400 jobs (up almost 27%); Production added over 2,000 jobs (up 8.5%); and Distribution added over 100 jobs (up 3%). At the same time, Processing lost almost 1,300 jobs (down 14.5%).

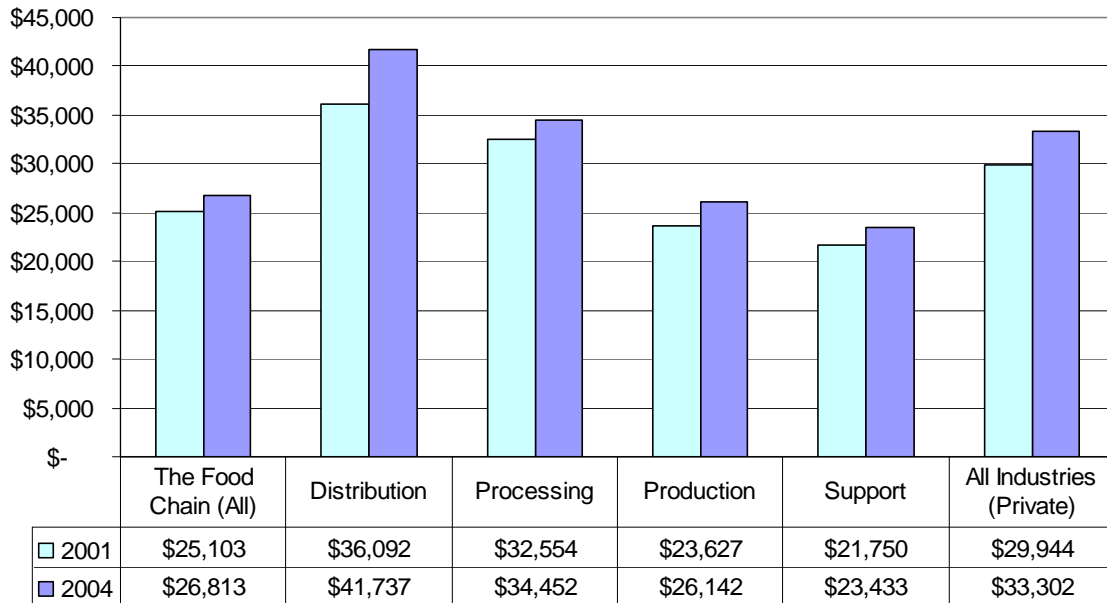
### Food Chain Jobs



Within Support, the largest sub-sector by far is Support Activities for Crop Production, with almost 31,500 jobs, followed by Veterinary Activities with almost 1,200 jobs. Within Production, the largest sub-sector is Vegetable & Melon Farming, followed by Fruit & Tree Nut Farming. Within Processing, the largest sub-sector is Other Food Manufacturing (led by Perishable Prepared Food Manufacturing and Seasoning & Dressing Manufacturing), followed by Wineries. Within Distribution, the largest sub-sector is Grocery & Related Product Wholesalers, followed by Specialty Food Stores.

The Food Chain cluster's average annual wage for the region in 2004 was \$26,813. Within the cluster, for Support jobs the average annual wage was \$23,433; for Production jobs the average was \$26,142; for Processing jobs the average was \$34,452; and, for Distribution jobs the average was \$41,737. The Food Chain cluster provides 19% of the region's economic base jobs.

### The Food Chain Wages



The following table provides information on employment by major component:

Central Coast Region				
Food Chain				
(Thousands of Jobs)				
	2001	2002	2003	2004
Support	27.7	29.1	33.2	35.0
Production	24.0	24.7	24.6	26.0
Processing	8.8	8.2	8.0	7.5
Distribution	4.7	5.0	5.4	4.9

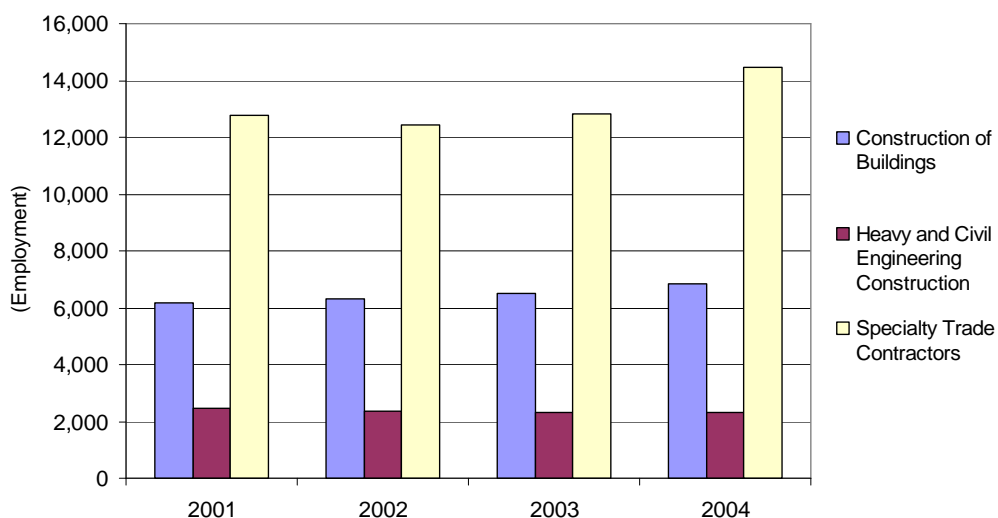
Source: California Employment Development Department

## CONSTRUCTION

The Construction industry provided over 6% of the economic base jobs for the Central Coast Region in 2004, and over 5% of all jobs in the region.

During the period of 1990 – 2002, Construction reported job growth of about 4,600 jobs, or over 25%. Construction employment decreased during the recession of the early '90s then grew from 1995 to 2002. Coming out of the recent recession, Construction jobs grew by 10% from 2001 to 2004, with a slight dip from 2001 to 2002, adding almost 2,200 jobs.

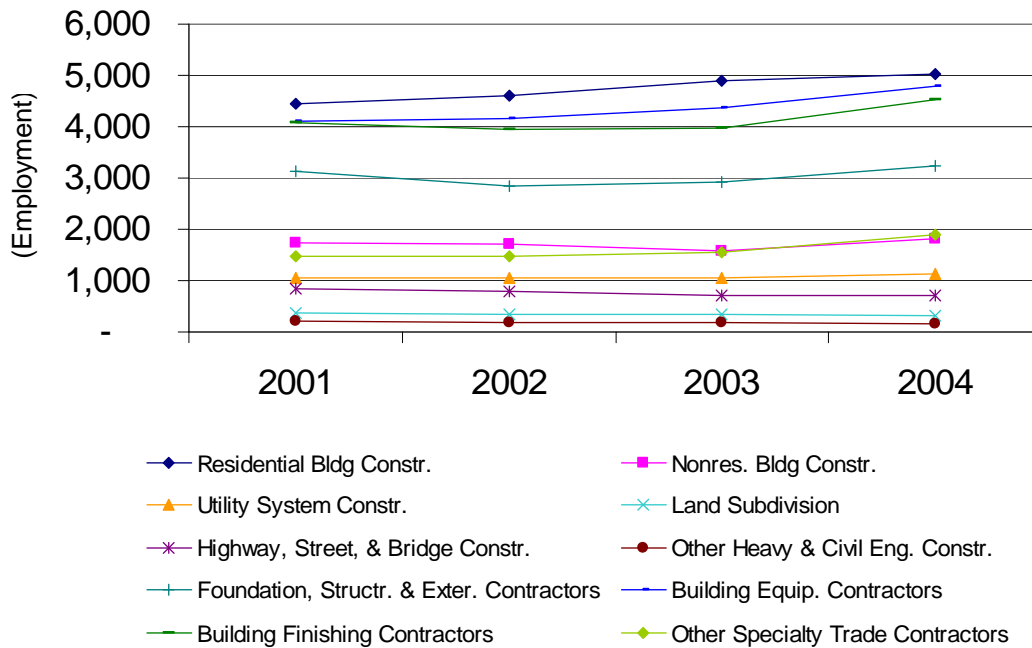
**Construction Jobs 2001-2004**



Within the Construction industry, the sectors providing the greatest number of jobs are Specialty Trade Contractors (led by Building Equipment Contractors and then Building Finishing Contractors) and Construction of Buildings (led by Residential Building Construction). Specialty Trade Contractors provided almost 14,500 jobs, or 61% of the industry's employment.

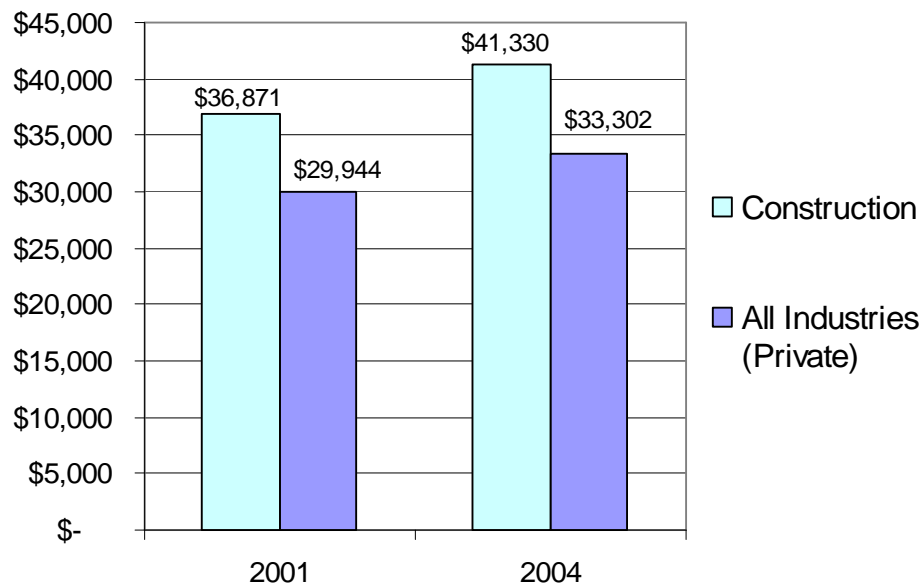
A sub-sector within the Construction of Buildings sector, the Residential Building Construction sub-sector, actually provided the most jobs of any sub-sector in the industry – over 5,000 jobs in 2004. This was followed closely by two sub-sectors in Specialty Trades Contractors, Building Equipment Contractors (4,800 jobs) and then Building Finishing Contractors (4,500 jobs).

## Construction Sub-sector Jobs



The industry's average annual wage for the region in 2004 was \$41,330, up over 12% from the 2001 average of \$36,871. Construction provides 6% of the region's economic base jobs. The following chart shows the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

## Construction Wages



The following table provides information on employment in the Construction industry:

<b>Central Coast Construction</b> (Thousands of Jobs)					
	1990	1994	2000	2002	2004
Residential Building Construction	3.7	2.0	4.2	4.8	5.0
Nonresidential Building Construction	1.5	1.0	1.6	1.8	1.8
Utility System Construction	1.4	1.0	1.1	1.1	1.1
Land Subdivision	0.5	0.1	0.3	0.3	0.4
Highway, Street & Bridge Construction	0.9	0.7	0.9	0.9	0.7
Other Heavy & Civil Engineering Construction	0.3	0.2	0.3	0.2	0.2
Foundation, Structure, & Exterior Contractors	1.9	1.6	3.4	3.1	3.2
Building Equipment Contractors	3.8	3.2	4.2	4.5	4.8
Building Finishing Contractors	2.9	2.1	4.0	4.3	4.5
Other Specialty Trade Contractors	1.1	0.8	1.5	1.6	1.9

Source: California Employment Development Department. Data for 1990, 1994, 2000 and 2002 are presented from the previous economic base report. Data for 2004 are presented from the current analysis of 2001-2004 data. The data source has changed since the earlier report.

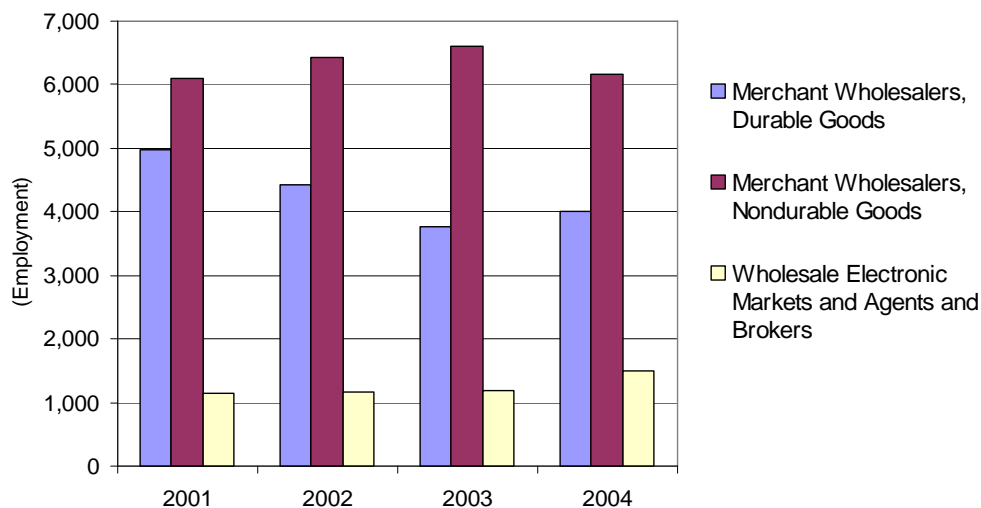
## WHOLESALE TRADE

Wholesale Trade provided 3% of the economic base jobs for the Central Coast Region in 2004, and 2.5% of all jobs in the region.

During the period of 1990-2002, Wholesale Trade employment grew from over 10,000 jobs to almost 13,000 jobs, about 21%. From 1990-1997, growth peaked in 1992, then fell and rose again, regaining jobs lost by 1997. Job growth continued through 2001, then began to fall, rising slightly in 2004. For the period of 2001-2004, the region lost over 500 jobs in Wholesale Trade, a loss of over 4%.

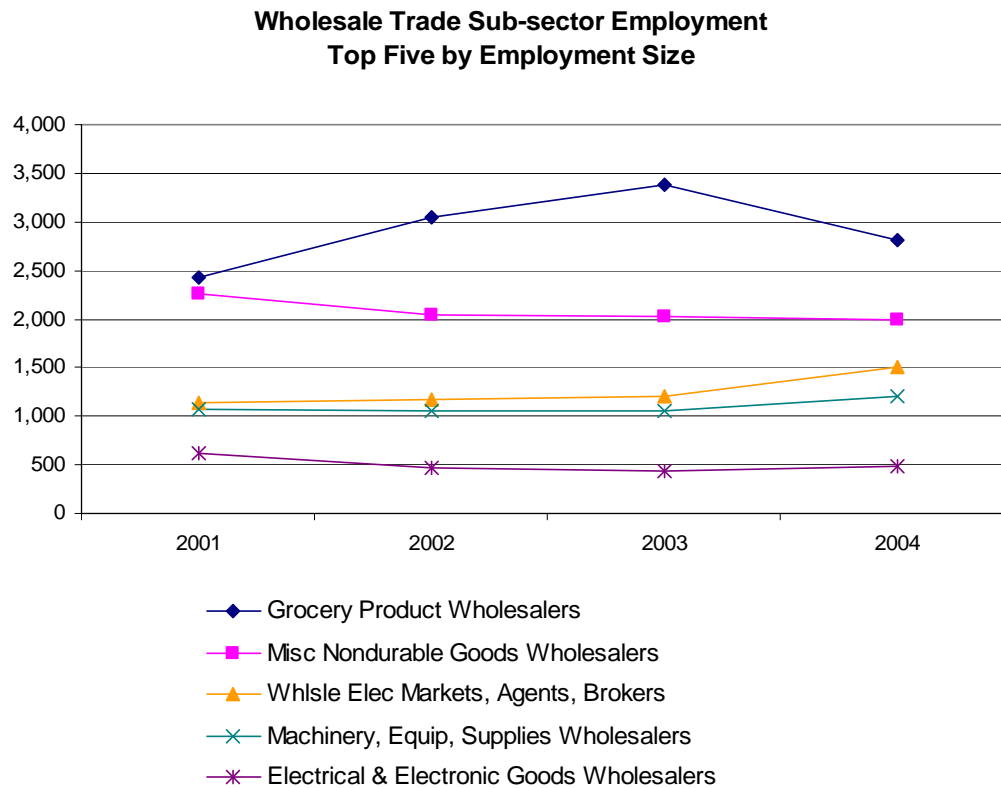
During 2001-2004, while the industry as a whole lost jobs, two of its three main sectors reported growth. The smallest, Wholesale Electronic Markets & Agents & Brokers, grew by almost 32% (almost 400 jobs); Merchant Wholesalers of Nondurable Goods grew by just over 1% (less than 100 jobs). Merchant Wholesalers of Durable Goods fell by almost 1,000 jobs, a loss of almost 20%.

**Wholesale Trade Jobs**

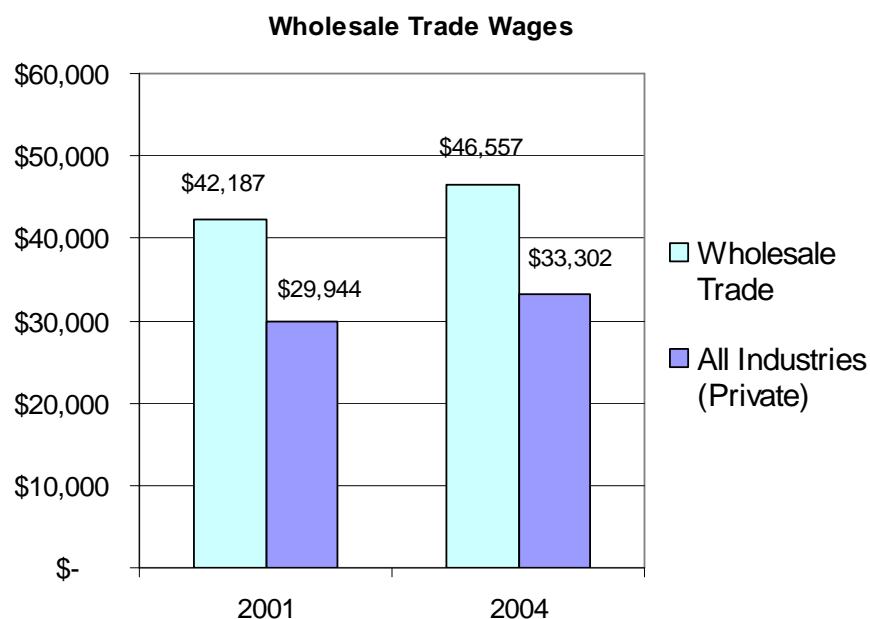


Within the Wholesale Trade industry, the sub-sectors providing the greatest number of jobs are Grocery & Related Product Wholesalers, with over 2,800 jobs in 2004. This was followed by Miscellaneous Nondurable Goods Merchant Wholesalers (almost 2,000 jobs), Wholesale Electronic Markets & Agents & Brokers (1,500 jobs), and Machinery, Equipment & Supplies Merchant Wholesalers (1,200 jobs).

The following graph shows job growth for the top five sub-sectors from 2001-2004:



The industry's average annual wage for the region in 2004 was \$46,557, up over 10% from the 2001 average of \$42,187. Wholesale Trade provides 3% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).



The following table provides information on employment in the industry:

<b>Central Coast Region</b> <b>Wholesale Trade</b> (Thousands of Jobs)					
	1990	1994	2000	2002	2004
Motor Vehicle, Parts, Supplies Wholesalers	0.5	0.4	0.4	0.4	0.5
Furniture & Home Furnishing Wholesalers	0.1	0.1	0.2	0.2	0.2
Lumber & Construction Materials Wholesalers	0.4	0.2	0.4	0.4	0.4
Prof. & Commercial Equip. & Supplies Wholesalers	0.8	1.2	1.5	1.3	0.5
Metal & Mineral (except Petroleum) Wholesalers	0.1	0.1	0.1	0.1	0.0*
Electrical & Electronic Goods Wholesalers	0.3	0.2	0.6	0.5	0.5
Hardware, Plumbing, Heating & Supplies Wholesalers	0.4	0.3	0.4	0.4	0.4
Machinery, Equipment, & Supplies Wholesalers	0.8	0.9	1.2	1.1	1.2
Miscellaneous Durable Goods Wholesalers	0.3	0.5	0.6	0.5	0.5
Paper & Paper Product Wholesalers	0.3	0.3	0.2	0.2	0.2
Drugs and Druggists' Sundries Wholesalers	0.1	0.1	0.1	0.2	0.2
Apparel, Piece Goods, & Notions Wholesalers	0.5	0.2	0.2	0.1	0.1
Grocery & Related Product Wholesalers	2.3	2.2	2.5	3.1	2.8
Farm Product Raw Material Wholesalers	0.0	0.0	0.0	0.0	2.0
Chemical & Allied Products Wholesalers	0.1	0.0	0.1	0.1	0.2
Petroleum & Petroleum Products Wholesalers	0.2	0.2	0.2	0.3	0.3
Beer, Wine, & Distilled Alcoholic Bev. Wholesalers	0.7	0.4	0.5	0.4	0.4
Miscellaneous Nondurable Goods Wholesalers	1.1	1.3	2.5	2.2	2.0
Wholesale Electronic Markets & Agents & Brokers	1.5	1.2	1.1	1.2	1.5

Source: California Employment Development Department. Data for 1990, 1994, 2000 and 2002 are presented from the previous economic base report. Data for 2004 are presented from the current analysis of 2001-2004 data. The data source has changed since the earlier report.

\* Employment was reported; however, jobs were less than 50, which rounded to 0.0 thousands.

## RETAIL TRADE

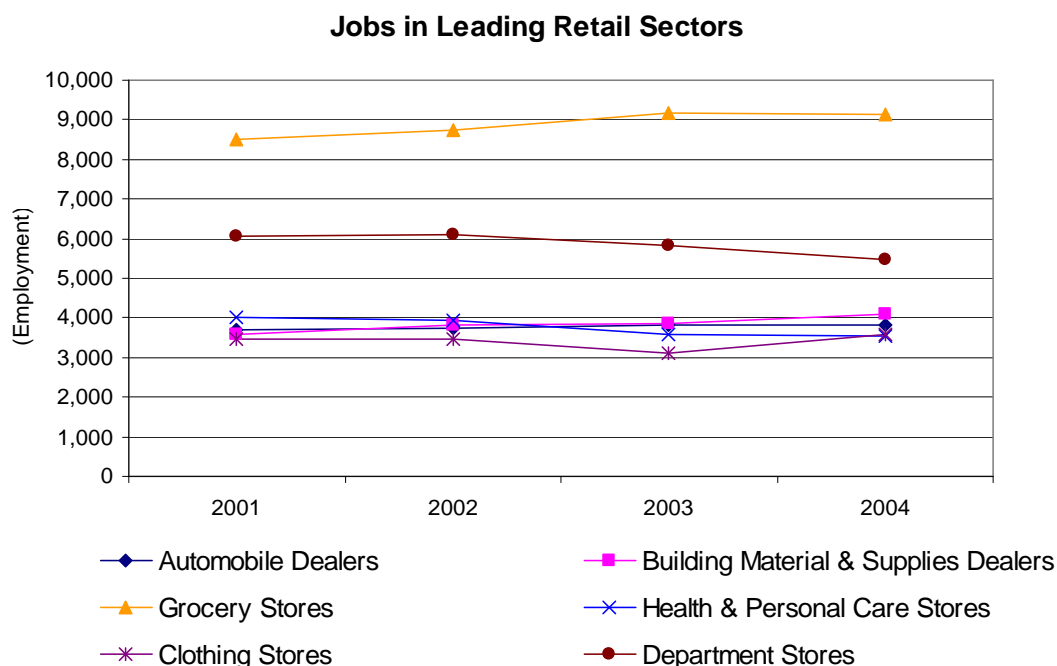
The Retail Trade industry provides over 13% of the jobs in the Central Coast Region's economic base, and 11% of all jobs in the region.

From 1990 – 2002, Retail Trade reported steady job growth, despite a slight dip during 1992-1994. During that period, Grocery Stores grew by 1,700 jobs, or 23%; Clothing Stores and Automobile Dealers grew by a combined 4,300; Health & Personal Care Stores gained 1,400 jobs; and, Building Materials & Supplies Dealers added 1,300 jobs.

For the 2001-2004 period, the Retail Trade industry grew by just 400 jobs, or less than 1%, with a slight dip in employment reported in 2003. In 1994, the industry reported a total of 50,900.

Within the industry, the largest sub-sectors are Grocery Stores (10,800 jobs in 2004), Department Stores (5,500 jobs), Building Material & Supplies Dealers (4,100 jobs), Automobile Dealers (3,800 jobs), and Clothing Stores (3,600 jobs), and Health & Personal Care Stores (3,600 jobs). All but two of these sub-sectors reported growth during 2001-2004; those reporting job losses were Department Stores and Health & Personal Care Stores.

The following graph shows job growth for these six sub-sectors from 2001-2004:



The industry's average annual wage for the region in 2004 was \$26,180, up almost 9% from the 2001 average of \$24,103. Retail Trade provides 13% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).



The following table provides employment data for the industry:

<b>Central Coast Region</b>					
<b>Retail Trade</b>					
(Thousands of Jobs)					
	1990	1994	2000	2002	2004
Automobile Dealers	3.1	2.8	3.8	3.9	3.8
Other Motor Vehicle Dealers	0.2	0.2	0.5	0.6	0.5
Auto Parts, Accessories, and Tire Stores	1.5	1.4	1.6	1.6	1.5
Furniture Stores	0.7	0.6	0.8	0.7	0.7
Home Furnishings Stores	0.8	0.8	1.7	1.3	1.3
Electronics & Appliance Stores	1.2	1.2	1.8	1.9	2.0
Building Material & Supplies Dealers	2.6	2.8	3.4	3.9	4.1
Lawn & Garden Equipment & Supplies Stores	1.1	0.7	0.7	0.6	0.7
Grocery Stores	7.3	7.0	8.3	9.0	9.1
Specialty Food Stores	1.2	1.1	1.7	1.3	1.2
Beer, Wine & Liquor Stores	0.8	0.7	0.7	0.6	0.5
Health & Personal Care Stores	2.7	3.3	3.9	4.1	1.6
Gasoline Stations	2.4	2.2	2.1	2.2	2.1
Clothing Stores	3.3	3.3	3.4	3.5	3.6
Shoe Stores	0.9	0.6	0.5	0.6	0.7
Jewelry, Luggage & Leather Goods Stores	0.6	0.7	0.7	0.8	0.7
Sporting Goods, Hobby & Musical Instr. Stores	1.7	1.7	2.2	2.1	2.0
Book, Periodical & Music Stores	0.8	1.2	1.2	1.1	1.0
Department Stores	5.2	5.6	6.5	6.3	5.5
Other General Merchandise Stores	1.4	0.7	1.1	1.1	1.6
Florists	0.5	0.5	0.4	0.4	0.4
Office Supplies, Stationery & Gift Stores	1.8	1.6	2.0	1.8	1.7
Used Merchandise Stores	0.3	0.3	0.5	0.6	0.5
Other Miscellaneous Store Retailers	0.9	0.7	1.1	1.3	1.2
Electronic Shopping & Mail-Order Houses	0.5	0.7	0.9	0.8	0.8
Vending Machine Operators	0.2	0.1	0.1	0.1	0.1
Direct Selling Establishments	0.7	0.5	0.6	0.5	0.4

Source: California Employment Development Department. Data for 2001 and 2004 are presented from the current analysis of 2001-2004 data. The data source has changed since the earlier report.

## PROFESSIONAL, SCIENTIFIC, TECHNICAL & MANAGEMENT SERVICES

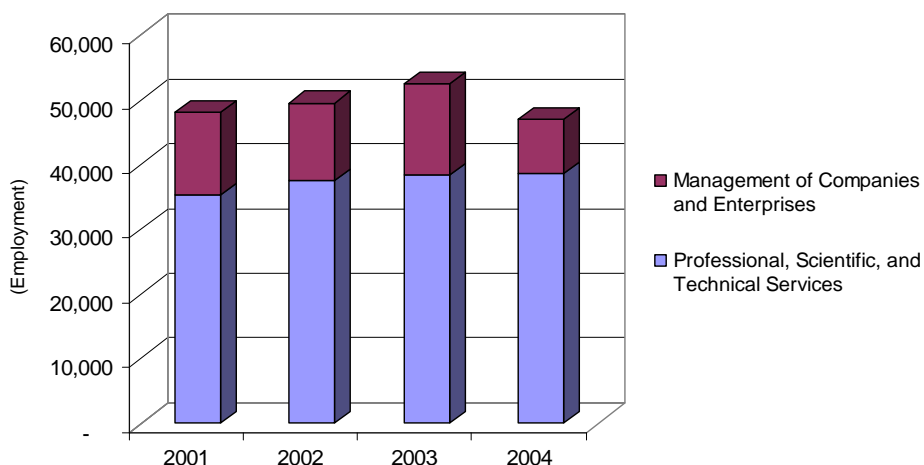
Professional, Scientific, Technical & Management Services combines two sectors; Professional, Scientific & Technical Services and Management of Companies & Enterprises. In the previous economic base reports for rural regions, including the Central Coast Region, these were discussed separately; however, they were combined for the previous reports for urban areas.

The Management of Companies and Enterprises sector is a newer category introduced by the NAICS coding system. There appears to have been significant changes in the use of the NAICS codes within this sector since its introduction, where companies originally using this classification may no longer identify themselves in the sector. In some or many cases, they may be identifying themselves within the Professional, Scientific & Technical Services sector.

The Professional, Scientific, Technical & Management Services industry provided 6% of the jobs in the Central Coast Region's economic base in 2004, and 5% of all jobs in the region.

For the period 1990-2002, employment in the Professional, Scientific & Technical Services rose from almost 15,000 in 1990 to almost 20,000 in 2002. There was a slight decline from 1990-1995, but employment rose steadily after that. During this same period, Management of Companies & Enterprises jobs increased from over 1,000 jobs to about 6,000 jobs in 2002, with growth peaking in 1996 and then higher in 1999. Jobs decreased from 1999 to 2002.

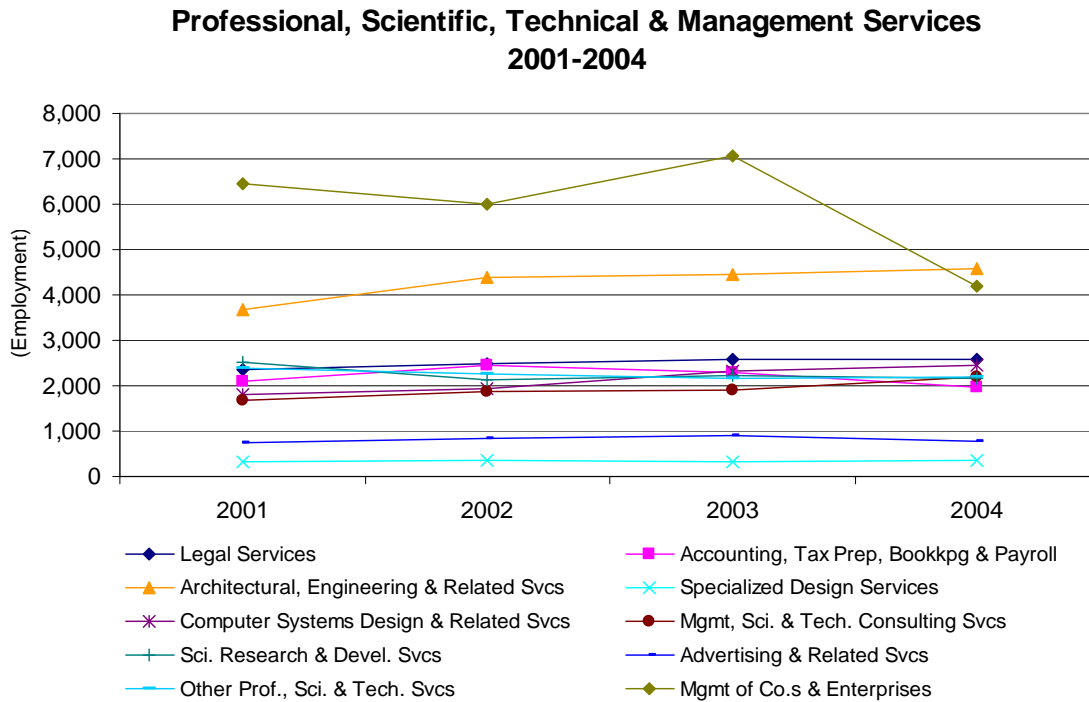
Professional, Scientific, Technical & Management Services



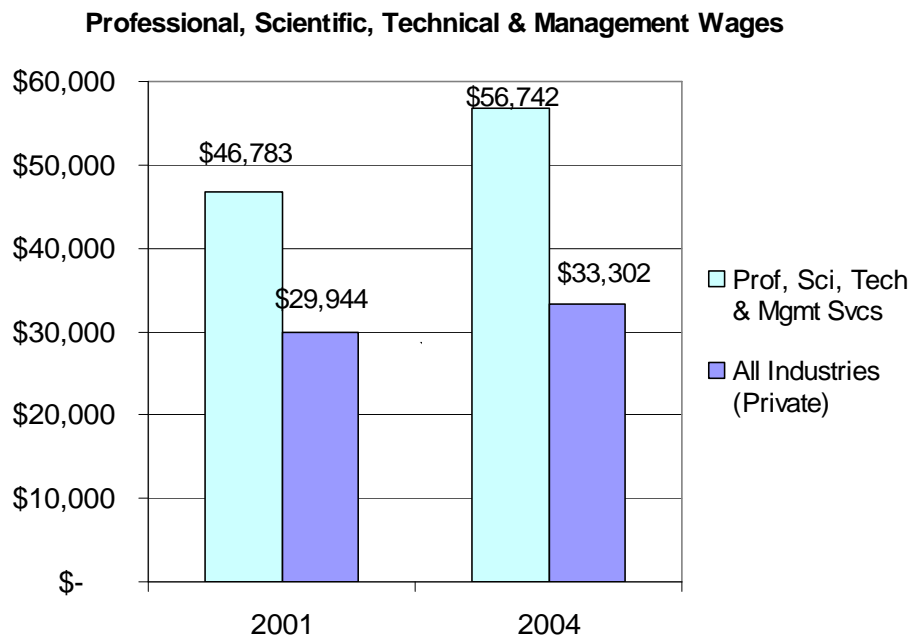
For the period 2001 – 2004, the Professional, Scientific, Technical & Management Services (combined) industry reported overall job losses of about 600 jobs, or 2.5%. Jobs grew from 2001 through 2003, and then dropped in 2004.

Within the industry, the sub-sectors providing the most jobs in 2004 were Architectural, Engineering & Related Services (almost 4,600 jobs); Management of Companies & Enterprises (almost 4,200 jobs); Legal Services (almost 2,600 jobs); and, Computer Systems Design & Related Services (almost 2,500 jobs).

The following graph shows employment for all industry sub-sectors.



The industry's average annual wage for the region in 2004 was \$56,742, up over 21% from the 2001 average of \$46,783. Professional, Scientific, Technical & Management Services provides 6% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).



The following table provides information on employment in the Professional, Scientific, Technical & Management Services industry:

<b>Central Coast Region</b>				
<b>Professional, Scientific, Technical &amp; Management Services</b>				
(Thousands of jobs)				
	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>
Legal Services	2.4	2.5	2.6	2.6
Accounting, Tax Prep, Bookkpg & Payroll	2.1	2.5	2.3	2.0
Architectural, Engineering & Related Svcs	3.7	4.4	4.5	4.6
Specialized Design Services	0.3	0.4	0.3	0.3
Computer Systems Design & Related Svcs	1.8	1.9	2.3	2.5
Mgmt, Sci. & Tech. Consulting Svcs	1.7	1.9	1.9	2.2
Sci. Research & Devel. Svcs	2.5	2.1	2.2	2.2
Advertising & Related Svcs	0.7	0.8	0.9	0.8
Other Prof., Sci. & Tech. Svcs	2.4	2.3	2.2	2.2
Mgmt of Co.s & Enterprises	6.0	6.0	7.0	4.2

Source: California Employment Development Department

## ADMINISTRATIVE, SUPPORT & WASTE SERVICES

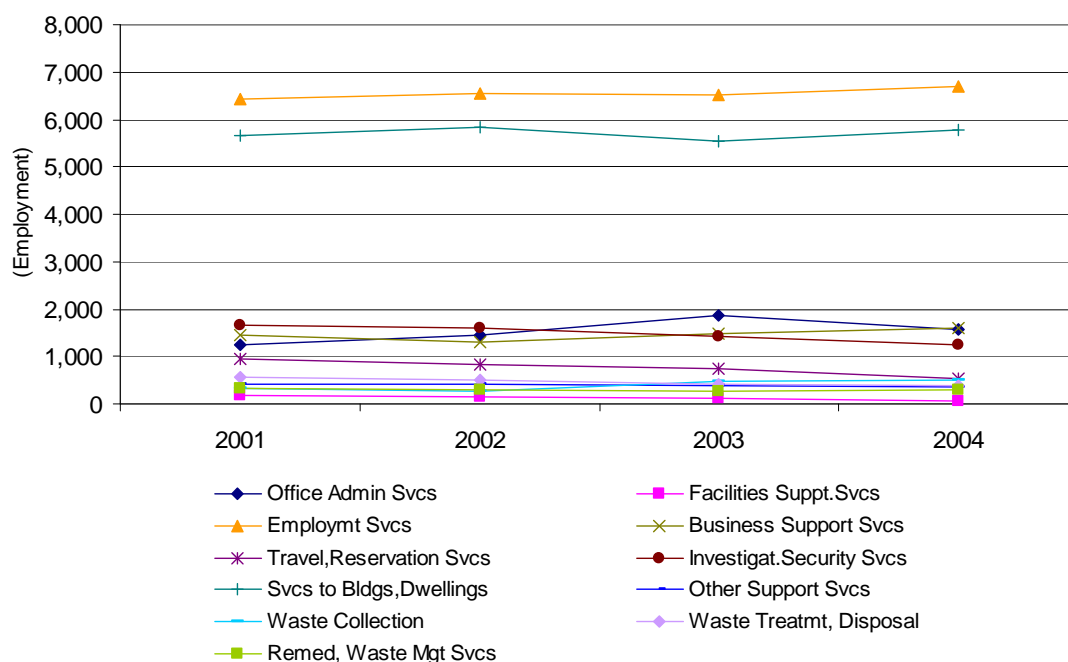
Administrative, Support & Waste Services includes the sectors Administrative & Support Services and Waste Management & Remediation Services. In 2004, this industry provided 5% of all economic base jobs in the Central Coast Region, and just over 4% of the region's total jobs.

From 1990-2002, Administrative, Support & Waste Services grew from under 15,000 to over 17,000 jobs, an increase of over 13%. Growth was strongest from 1990-2000, then employment leveled off from 2000-2002, with a slight decrease. Employment has since fluctuated, reporting slight job losses for the period of 2001-2004 of less than 1%.

The largest sector within the industry is Administrative & Support Services, with almost 94% of the industry's jobs; this sector reported a slight loss of just over 100 jobs for the 2001-2004 period. The other sector, Waste Management & Remediation Services, provides just over 6% of the industry's jobs, and reported almost zero job growth during the same period.

Administrative, Support & Waste Services is made up of eleven sub-sectors, two of which provide the majority of the employment within the industry. These are Employment Services and Services to Buildings & Dwellings. Both grew from 1990-2002, with Employment Services reporting leaps and drops in employment from 1995-1997 and again from 1999-2001. For the period of 2001 - 2004, Employment Services reported growth of 4%. Services to Buildings & Dwellings reported more stable growth from 1990-2002; from 2001-2004, growth has fluctuated, with an overall gain of almost 2%. The following graph shows the changes in employment for all eleven industry sub-sectors from 2001 through 2004:

**Administrative, Support & Waste Services  
Sub-sector Employment Growth**



The industry's average annual wage for the region in 2004 was \$27,151, up over 13% from the 2001 average of \$23,952. Administrative, Support & Waste Services provides 5% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).



The following table provides employment data for the sub-sectors within the industry:

<b>Central Coast Region</b>					
<b>Administrative, Support &amp; Waste Services</b>					
(Thousands of Jobs)					
	1990	1994	2000	2002	2004
Office Administrative Services	0.6	0.9	1.1	1.5	1.6
Facilities Support Services	0.2	0.2	0.2	0.1	0.1
Employment Services	4.3	3.6	7.3	6.6	6.7
Business Support Services	1.1	1.6	1.5	1.3	1.6
Travel Arrangement & Reservation Services	0.7	0.7	1.0	0.9	0.5
Investigation & Security Services	1.4	1.5	2.0	1.6	1.3
Services to Buildings & Dwellings	3.7	4.1	5.4	5.9	5.8
Other Support Services	0.5	0.5	0.4	0.4	0.3
Waste Collection	0.2	0.3	0.3	0.3	0.5
Waste Treatment & Disposal	0.3	0.3	0.5	0.5	0.4
Remediation & Other Waste Mgmt Svcs	0.4	0.3	0.3	0.3	0.3

Source: California Employment Development Department. Data for 2001 and 2004 are presented from the current analysis of 2001-2004 data. The data source has changed since the earlier report.

## HEALTH SCIENCES & SERVICES

For the previous economic base report, the Health Care & Social Assistance industry was used for studying employment in health care. The industry also included social services. For this and future reports, the Health Sciences & Services industry cluster will be used instead of Health Care & Social Assistance.

The Health Sciences & Services cluster includes health care services, such as offices of physicians, dentists, other health practitioners and other outpatient care facilities; hospitals; laboratories; home health care; nursing care and other residential care facilities. It also includes community, emergency and other relief services; vocational rehabilitation services; and, death care services. Within health sciences, the cluster includes pharmaceutical and medicine manufacturing; medical equipment and supplies manufacturing; and, scientific research and development (R&D) services.

In 2004, the Health Sciences & Services cluster was the fifth largest component of the Central Coast Region's economic base, providing 35,800 jobs - almost 10% of the economic base jobs, and 8% of all jobs in the region.

From 1990-2002, the Health Sciences & Services cluster grew 2.7% annually, while the rest of the economic grew 1.6% annually, as reported in the study, *Golden Opportunity, Growing Crisis: The Health Sciences and Services Cluster (September 2004)*. Growth accelerated from 2000 – 2002, with a growth rate of 3.8%. Jobs were reported at 37,000<sup>4</sup> in 2002.

From 2001-2004, Health Sciences & Services reported steady job growth. Overall, the cluster added 2,300 jobs, an increase of almost 7%. Within the cluster, the health sciences sub-sectors provided 12%.

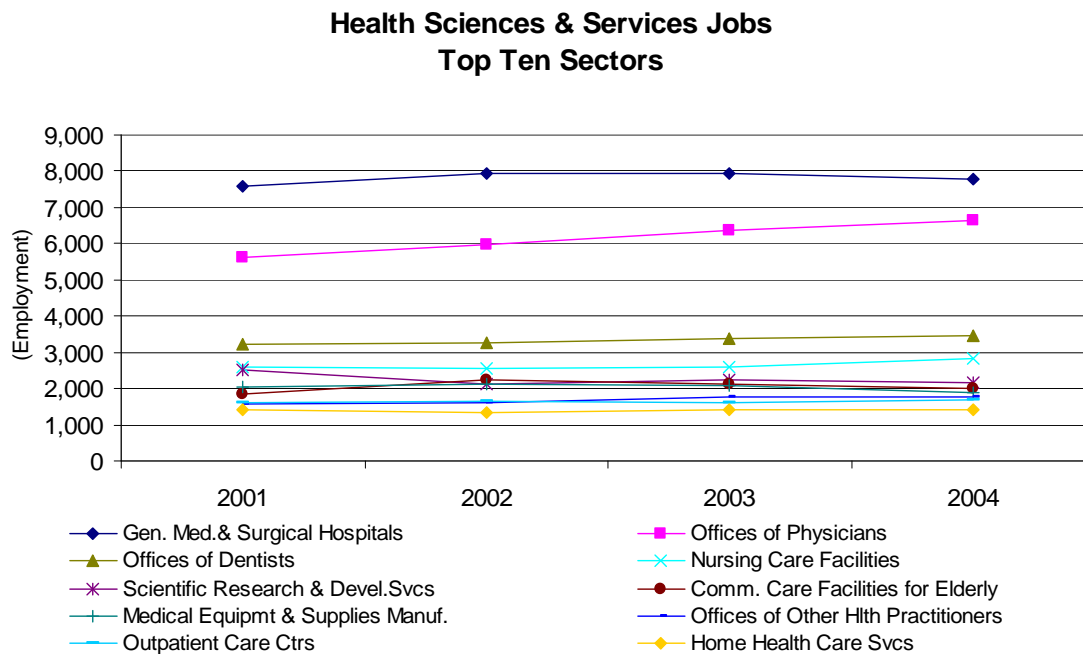
During the 2001-2004 period, General & Medical Surgical Hospitals continued to provide the most jobs within the cluster (almost 7,800 jobs in 2004), and reported an overall increase of less than 3%. The second largest sub-sector, Offices of Physicians (6,700 jobs) grew by almost 19%, and the third largest, Offices of Dentists (3,500 jobs) grew by almost 8%. These were followed by Nursing Care Facilities (2,800 jobs), up 9%; and, Scientific Research & Development Services (2,200 jobs), down almost 14%.

During this same period, small sub-sectors reported the highest growth. These included Other Residential Care Facilities, reporting 56% growth and almost 1,000 jobs in 2004; and Medical & Diagnostic Laboratories, reporting 32% growth, but with less than 300 jobs in 2004.

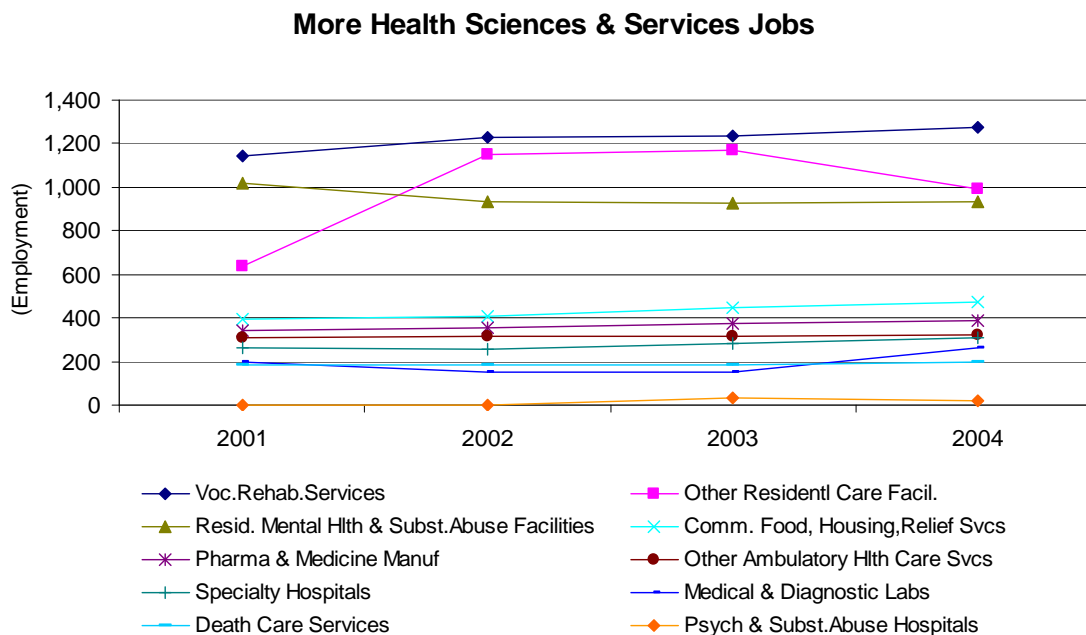
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<sup>4</sup> This number differs slightly from the current 2001-2004 data, which shows about 35,800 jobs in 2002. This difference may be due to the use of different data sources, or possibly due to rounding at the thousands level instead of the hundreds level.

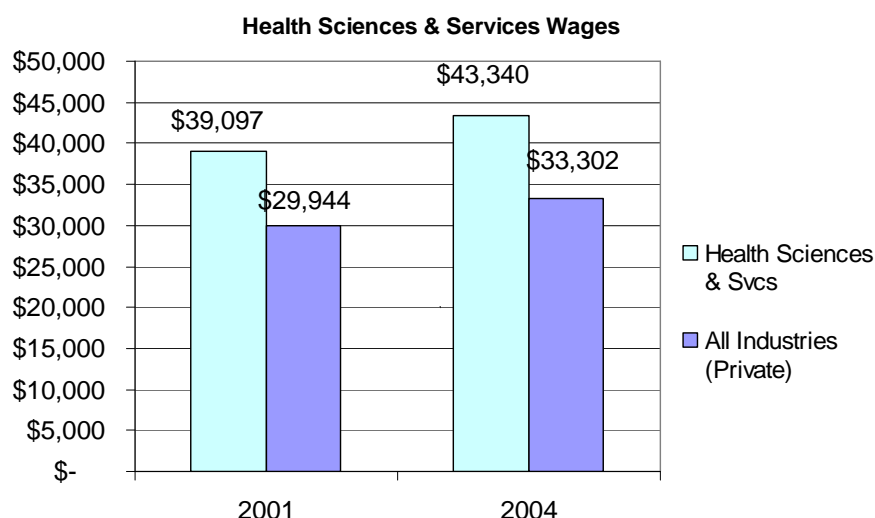
The following graph shows the change in employment from 2001 to 2004 for the top ten sub-sectors, based on 2004 employment levels:



The next graph shows the change in employment from 2001 to 2004 for the remaining sub-sectors:



The cluster's average annual wage for the region in 2004 was \$43,340, up almost 11% from the 2001 average of \$39,097. Health Sciences & Services provides 10% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).



The following table provides data on cluster employment by sub-sector for 2001-2004:

<b>Central Coast Region</b> <b>Health Sciences &amp; Services</b> (Thousands of Jobs)				
	2001	2002	2003	2004
Pharmaceutical & Medicine Manufacturing	0.3	0.4	0.4	0.4
Medical Equipment & Supplies Manufacturing	2.0	2.1	2.1	1.9
Scientific Research & Development Services	2.5	2.1	2.2	2.2
Offices of Physicians	5.6	6.0	6.4	6.7
Offices of Dentists	3.2	3.3	3.4	3.5
Offices of Other Health Practitioners	1.6	1.6	1.8	1.8
Outpatient Care Centers	1.6	1.6	1.6	1.7
Medical & Diagnostic Laboratories	0.2	0.2	0.2	0.3
Home Health Care Services	1.4	1.3	1.4	1.4
Other Ambulatory Health Care Services	0.3	0.3	0.3	0.3
General Medical & Surgical Hospitals	7.6	8.0	7.9	7.8
Psychiatric & Substance Abuse Hospitals	0.0	0.0	0.0*	0.0*
Specialty (except Psychiatric & Subst. Abuse) Hospitals	0.3	0.3	0.3	0.3
Nursing Care Facilities	2.6	2.6	2.6	2.8
Residential Mental Health & Subst. Abuse Facilities	1.0	0.9	0.9	0.9
Community Care Facilities for the Elderly	1.8	2.2	2.1	2.0
Other Residential Care Facilities	0.6	1.2	1.2	1.0
Comm. Food, Housing, Emergency & Other Relief Svcs	0.4	0.4	0.4	0.5
Vocational Rehabilitation Services	1.1	1.2	1.2	1.3
Death Care Services	0.2	0.2	0.2	0.2

Source: California Employment Development Department.

Data for 1990 – 2002 are presented from the previous economic base report.

\* Employment was reported; however, jobs were less than 50, which rounded to 0.0 thousands.

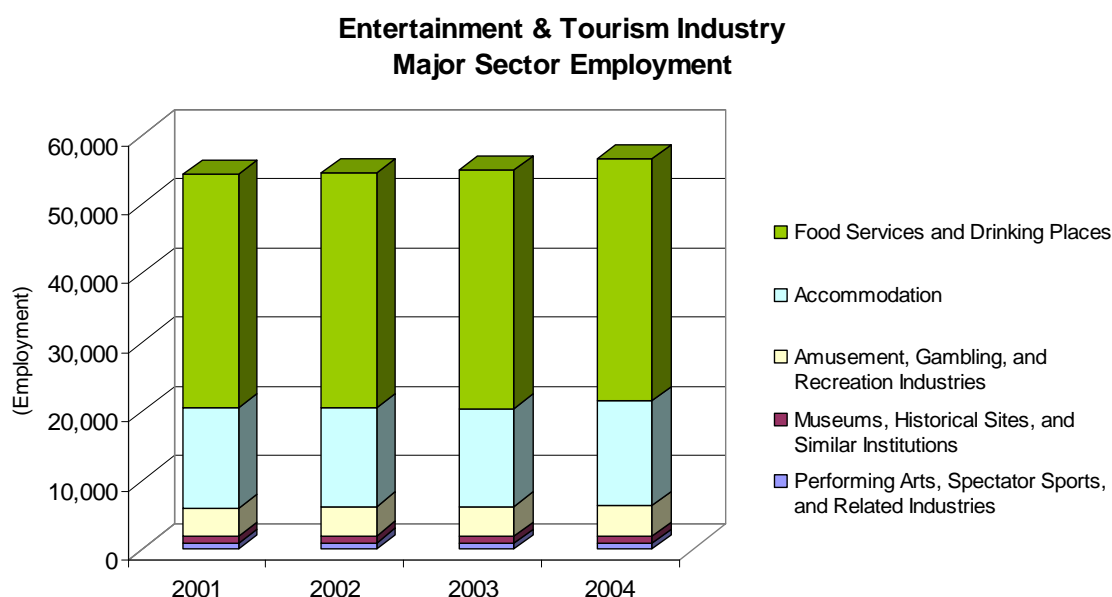
## ENTERTAINMENT & TOURISM

The Entertainment & Tourism Industry combines Accommodation & Food Services with Arts, Entertainment & Recreation. For the previous economic base report, these two sectors were considered separately, and only an analysis of Accommodation & Food Services was included in the report.

The Entertainment & Tourism industry is the third largest component of the Central Coast Region's economic base. The industry provides almost 15% of the economic base jobs, and over 12% of all jobs in the region.

From 1990-2002, Accommodation & Food Services (analyzed separately) showed steady growth. This sector was driven by Full Service Restaurants, Traveler Accommodations and Limited-Service Eating Places, with all three of these sub-sectors reporting steady growth.

During the 2001-2004 period, Entertainment & Tourism grew by over 2,300 jobs, or over 4%. Four of the five industry sectors reported job growth; only Museums, Historical Sites & Similar Institutions reported job losses, and these were less than 1%. The largest sector, Food Services & Drinking Places sector reported growth of 4%. The second largest, Accommodation, reported growth of 3.5%. Growth was also reported by Amusement, Gambling & Recreation Industries (up 9%) and Performing Arts, Spectator Sports & Related Industries (up 8%).



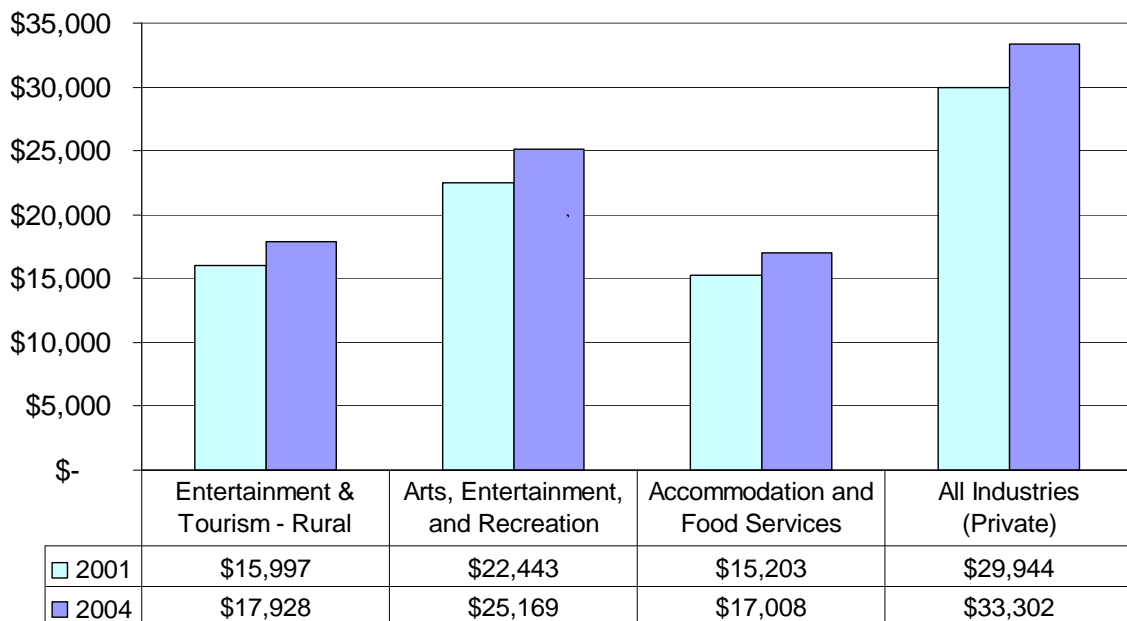
Within Entertainment & Tourism, three sub-sectors provided 85% of the industry's jobs in 2004. These were Full Service Restaurants (almost 19,100 jobs), Traveler Accommodations (14,600 jobs) and Limited Service Eating Places (14,500 jobs).

### Entertainment & Tourism Jobs Top Six Sub-sectors



The industry's average annual wage for the region in 2004 was \$17,928, up over 12% from the 2001 average of \$15,997. Entertainment & Tourism provides 15% of the region's economic base jobs. Within the industry, the Arts, Entertainment & Recreation sector reported the highest average wage. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

### Entertainment & Tourism Wages



The following table provides data on all sub-sectors in the industry, listed in NAICS code order:

<b>Central Coast Region</b> <b>Entertainment &amp; Tourism</b> (Thousands)				
	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>
Performing Arts Companies	0.5	0.5	0.4	0.4
Spectator Sports	0.1	0.1	0.1	0.2
Promoters of Performing Arts, Sports, & Similar Events	0.1	0.2	0.2	0.1
Agents & Managers for Public Figures	0.0*	0.0*	0.0*	0.0*
Independent Artists, Writers, & Performers	0.1	0.1	0.2	0.2
Museums, Historical Sites, & Similar Institutions	1.0	1.0	1.0	1.0
Amusement Parks and Arcades	0.1	0.1	0.1	0.1
Gambling Industries	0.1	0.0*	0.1	0.1
Other Amusement & Recreation Industries	4.0	4.1	4.2	4.3
Traveler Accommodation	14.2	13.8	13.7	14.6
RV (Recreational Vehicle) Parks & Rec. Camps	0.2	0.3	0.3	0.3
Rooming and Boarding Houses	0.2	0.2	0.2	0.2
Full-Service Restaurants	19.3	19.4	19.2	19.1
Limited-Service Eating Places	12.8	13.1	13.6	14.5
Special Food Services	0.7	0.7	1.0	1.0
Drinking Places (Alcoholic Beverages)	0.8	0.8	0.7	0.6

Source: California Employment Development Department

\* Employment was reported; however, jobs were less than 50, which rounded to 0.0 thousands.

## ALL GOVERNMENT

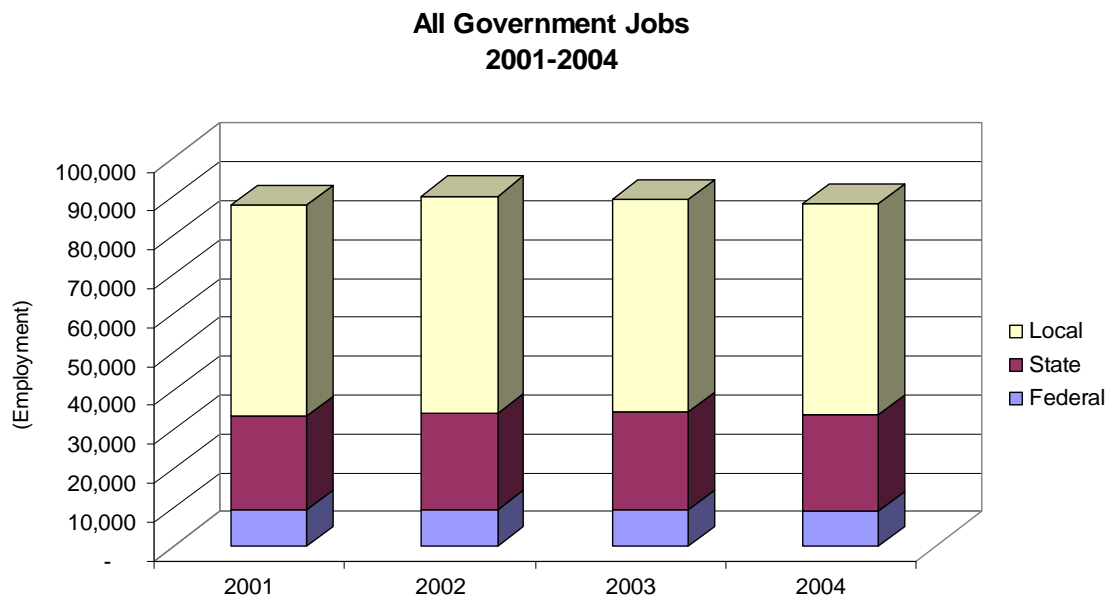
All Government includes federal, state and local government jobs. Jobs in public education are reported in the state and local government sectors. Government jobs also include defense (reported at the federal level), law enforcement, firefighting and public services.

All Government continues to provide the greatest number of jobs for the Central Coast Region. This industry provided 23% of the economic base jobs in the region in 2004, and 19% of all jobs in the region.

From 1990-2002, All Government jobs grew from over 80,000 to 90,000 jobs, with a steady growth trend from 1994-2002. During the period 2001-2004 job growth peaked in 2002, then decreasing for the next two years, to 88,000 jobs in 2004. Overall, All Government grew by less than 0.5% for the 2001-2004 period.

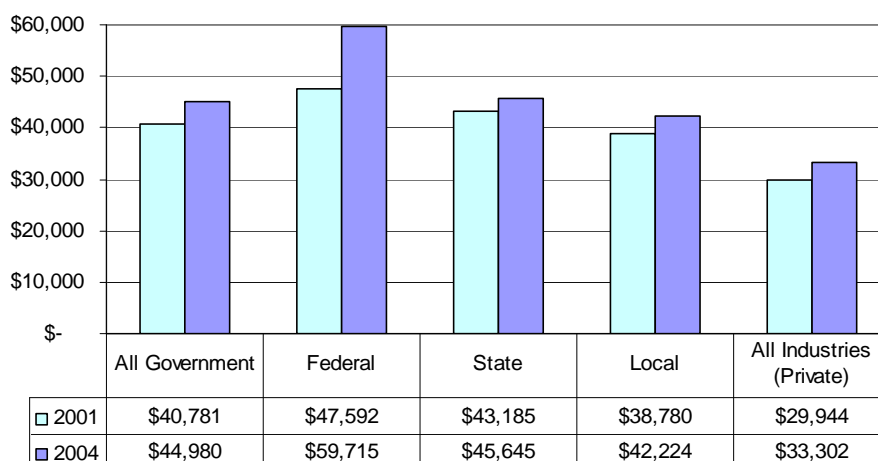
Local Government (including Local Education) represents almost 62% of all government jobs; State Government (including Local Education) represents 28% of all government jobs; and, Federal Government (including Defense) represents the remaining 10%.

In 2004, Local Government totaled 54,400 jobs. From 2001-2004, Local Government increased by just 200 jobs, up less than 0.5%. During this same period, Federal Government jobs decreased by 200 jobs to 9,100, down 2%; and, State Government jobs increased by 500 jobs to 24,600, up 2%. The following graph shows the employment levels and fluctuations within this period.



All Government average annual wages include the wages for a broad spectrum of jobs, including elected officials and executive branch, judicial, defense, law enforcement, firefighting, education and other public administration jobs. The industry's average annual wage for the region in 2004 was \$44,980, up over 10% from the 2001 average of \$40,781. Within All Government, the average annual wage for Federal Government was \$59,715; the average for State Government was \$45,645; and, the average annual wage for Local Government was \$42,224. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

**All Government Wages**



The following table shows employment for each level of government from 2001-2004:

<b>Central Coast Region</b> <b>All Government</b> (Thousands of Jobs)				
	2001	2002	2003	2004
Federal Government (includes Defense)	9.3	9.5	9.4	9.1
State Government (All)	24.1	24.7	25.2	24.6
State Government Education	14.1	14.4	14.7	14.3
Local Government (All)	54.2	55.9	54.6	54.4
Local Government Education	22.3	23.1	22.9	23.1

Source: California Employment Development Department

Some government employment may be suppressed due to confidentiality requirements.

## **APPENDIX A: Definition of Industry Sectors and Clusters by NAICS Codes**

The following lists the major industries and clusters included in the economic base reports, and defines them by NAICS code and classification. Most of these are defined at the three-digit and/or four-digit NAICS code levels, but some are defined at the five-digit and/or six-digit NAICS code levels.

### **THE FOOD CHAIN**

#### **Distribution**

4244	Grocery and Related Product Wholesalers
4245	Farm Product Raw Material Merchant Wholesalers
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
42491	Farm Supplies Merchant Wholesalers
4452	Specialty Food Stores
49313	Farm Product Warehousing and Storage

#### **Processing**

3111	Animal Food Manufacturing
3112	Grain and Oilseed Milling
3113	Sugar and Confectionery Product Manufacturing
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
3115	Dairy Product Manufacturing
3116	Animal Slaughtering and Processing
3117	Seafood Product Preparation and Packaging
3118	Bakeries and Tortilla Manufacturing
3119	Other Food Manufacturing
322215	Nonfolding Sanitary Food Container Manufacturing
32616	Plastics Bottle Manufacturing
327213	Glass Container Manufacturing
332115	Crown and Closure Manufacturing
332431	Metal Can Manufacturing
31211	Soft Drink and Ice Manufacturing
31212	Breweries
31213	Wineries
31214	Distilleries

#### **Production**

1111	Oilseed and Grain Farming
1113	Fruit and Tree Nut Farming
11141	Food Crops Grown Under Cover
11193	Sugarcane Farming
11194	Hay Farming
111991	Sugar Beet Farming
111992	Peanut Farming
1112	Vegetable and Melon Farming

111998	All Other Miscellaneous Crop Farming
1121	Cattle Ranching and Farming
1122	Hog and Pig Farming
1123	Poultry and Egg Production
1124	Sheep and Goat Farming
1125	Animal Aquaculture
1129	Other Animal Production
1141	Fishing
1142	Hunting and Trapping

## **Support**

1151	Support Activities for Crop Production
1152	Support Activities for Animal Production
22131	Water Supply and Irrigation Systems
23711	Water and Sewer Line and Related Structures Construction
32192	Wood Container and Pallet Manufacturing
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
33311	Agricultural Implement Manufacturing
333294	Food Product Machinery Manufacturing
42382	Farm and Garden Machinery and Equipment Merchant Wholesalers
54194	Veterinary Services

## **CONSTRUCTION**

236	Construction of Buildings
2361	Residential Building Construction
2362	Nonresidential Building Construction
237	Heavy and Civil Engineering Construction
2371	Utility System Construction
2372	Land Subdivision
2373	Highway, Street, and Bridge Construction
2379	Other Heavy and Civil Engineering Construction
238	Specialty Trade Contractors
2381	Foundation, Structure, and Building Exterior Contractors
2382	Building Equipment Contractors
2383	Building Finishing Contractors
2389	Other Specialty Trade Contractors

## **MANUFACTURING VALUE CHAIN**

### **Design**

5413	Architectural, Engineering, and Related Services
5414	Specialized Design Services
5416	Management, Scientific, and Technical Consulting Services
5419	Other Professional, Scientific, and Technical Services

## Production

3111	Animal Food Manufacturing
3112	Grain and Oilseed Milling
3113	Sugar and Confectionery Product Manufacturing
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
3115	Dairy Product Manufacturing
3116	Animal Slaughtering and Processing
3117	Seafood Product Preparation and Packaging
3118	Bakeries and Tortilla Manufacturing
3119	Other Food Manufacturing
3121	Beverage Manufacturing
3122	Tobacco Manufacturing
3131	Fiber, Yarn, and Thread Mills
3132	Fabric Mills
3133	Textile and Fabric Finishing and Fabric Coating Mills
3141	Textile Furnishings Mills
3149	Other Textile Product Mills
3151	Apparel Knitting Mills
3152	Cut and Sew Apparel Manufacturing
3159	Apparel Accessories and Other Apparel Manufacturing
3161	Leather and Hide Tanning and Finishing
3162	Footwear Manufacturing
3169	Other Leather and Allied Product Manufacturing
3211	Sawmills and Wood Preservation
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing
3219	Other Wood Product Manufacturing
3221	Pulp, Paper, and Paperboard Mills
3222	Converted Paper Product Manufacturing
3231	Printing and Related Support Activities
3241	Petroleum and Coal Products Manufacturing
3251	Basic Chemical Manufacturing
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
3255	Paint, Coating, and Adhesive Manufacturing
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing
3259	Other Chemical Product and Preparation Manufacturing
3261	Plastics Product Manufacturing
3262	Rubber Product Manufacturing
3271	Clay Product and Refractory Manufacturing
3272	Glass and Glass Product Manufacturing
3273	Cement and Concrete Product Manufacturing
3274	Lime and Gypsum Product Manufacturing
3279	Other Nonmetallic Mineral Product Manufacturing
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3312	Steel Product Manufacturing from Purchased Steel
3313	Alumina and Aluminum Production and Processing
3314	Nonferrous Metal (except Aluminum) Production and Processing
3315	Foundries
3321	Forging and Stamping

3322	Cutlery and Handtool Manufacturing
3323	Architectural and Structural Metals Manufacturing
3324	Boiler, Tank, and Shipping Container Manufacturing
3325	Hardware Manufacturing
3326	Spring and Wire Product Manufacturing
3327	Machine Shops-Turned Product- and Screw, Nut, and Bolt Manufacturing
3328	Coating, Engraving, Heat Treating, and Allied Activities
3329	Other Fabricated Metal Product Manufacturing
3331	Agriculture, Construction, and Mining Machinery Manufacturing
3332	Industrial Machinery Manufacturing
3333	Commercial and Service Industry Machinery Manufacturing
3334	Ventilation, Heating, Air-Conditioning and Commercial Refrigeration Equipment Manufacturing
3335	Metalworking Machinery Manufacturing
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing
3339	Other General Purpose Machinery Manufacturing
3341	Computer and Peripheral Equipment Manufacturing
3342	Communications Equipment Manufacturing
3343	Audio and Video Equipment Manufacturing
3344	Semiconductor and Other Electronic Component Manufacturing
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
3346	Manufacturing and Reproducing Magnetic and Optical Media
3351	Electric Lighting Equipment Manufacturing
3352	Household Appliance Manufacturing
3353	Electrical Equipment Manufacturing
3359	Other Electrical Equipment and Component Manufacturing
3361	Motor Vehicle Manufacturing
3362	Motor Vehicle Body and Trailer Manufacturing
3363	Motor Vehicle Parts Manufacturing
3364	Aerospace Product and Parts Manufacturing
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing
3372	Office Furniture (including Fixtures) Manufacturing
3379	Other Furniture Related Product Manufacturing

## Logistics

4811	Scheduled Air Transportation
4812	Nonscheduled Air Transportation
4821	Rail Transportation
4831	Deep Sea, Coastal, and Great Lakes Water Transportation
4832	Inland Water Transportation
4841	General Freight Trucking
4842	Specialized Freight Trucking
4861	Pipeline Transportation of Crude Oil
4862	Pipeline Transportation of Natural Gas
4869	Other Pipeline Transportation
4881	Support Activities for Air Transportation
4882	Support Activities for Rail Transportation
4883	Support Activities for Water Transportation
4884	Support Activities for Road Transportation
4885	Freight Transportation Arrangement

4889	Other Support Activities for Transportation
4911	Postal Service
4921	Couriers
4922	Local Messengers and Local Delivery
4931	Warehousing and Storage

## WHOLESALE TRADE

423	Merchant Wholesalers, Durable Goods
424	Merchant Wholesalers, Nondurable Goods
425	Wholesale Electronic Markets & Agents & Brokers

## RETAIL TRADE

441	Motor Vehicle and Parts Dealers
4411	Automobile Dealers
4412	Other Motor Vehicle Dealers
4413	Automotive Parts, Accessories, and Tire Stores
442	Furniture and Home Furnishings Stores
4421	Furniture Stores
4422	Home Furnishings Stores
443	Electronics and Appliance Stores
4431	Electronics and Appliance Stores
444	Building Material and Garden Equipment and Supplies Dealers
4441	Building Material and Supplies Dealers
4442	Lawn and Garden Equipment and Supplies Stores
445	Food and Beverage Stores
4451	Grocery Stores
4452	Specialty Food Stores
4453	Beer, Wine, and Liquor Stores
446	Health and Personal Care Stores
4461	Health and Personal Care Stores
447	Gasoline Stations
4471	Gasoline Stations
448	Clothing and Clothing Accessories Stores
4481	Clothing Stores
4482	Shoe Stores
4483	Jewelry, Luggage, and Leather Goods Stores
451	Sporting Goods, Hobby, Book, and Music Stores
4511	Sporting Goods, Hobby, and Musical Instrument Stores
4512	Book, Periodical, and Music Stores
452	General Merchandise Stores
4521	Department Stores
4529	Other General Merchandise Stores
453	Miscellaneous Store Retailers
4531	Florists
4532	Office Supplies, Stationery, and Gift Stores
4533	Used Merchandise Stores
4539	Other Miscellaneous Store Retailers
454	Nonstore Retailers

- 4541 Electronic Shopping and Mail-Order Houses
- 4542 Vending Machine Operators
- 4543 Direct Selling Establishments

## **BASIC INFORMATION SERVICES**

- 511 Publishing Industries (except Internet)
- 515 Broadcasting (except Internet)
- 516 Internet Publishing and Broadcasting
- 517 Telecommunications
- 518 Internet Service Providers, Web Search Portals, and Data Processing Services
- 519 Other Information Services
  
- 5111 Newspaper, Periodical, Book, and Directory Publishers
- 5112 Software Publishers
- 5151 Radio and Television Broadcasting
- 5152 Cable and Other Subscription Programming
- 5161 Internet Publishing and Broadcasting
- 5171 Wired Telecommunications Carriers
- 5172 Wireless Telecommunications Carriers (except Satellite)
- 5173 Telecommunications Resellers
- 5174 Satellite Telecommunications
- 5175 Cable and Other Program Distribution
- 5179 Other Telecommunications
- 5181 Internet Service Providers and Web Search Portals
- 5182 Data Processing, Hosting, and Related Services
- 5191 Other Information Services

## **REAL ESTATE & RENTAL & LEASING**

- 531 Real Estate
- 5311 Lessors of Real Estate
- 5312 Offices of Real Estate Agents and Brokers
- 5313 Activities Related to Real Estate
- 532 Rental and Leasing Services
- 5321 Automotive Equipment Rental and Leasing
- 5322 Consumer Goods Rental
- 5323 General Rental Centers
- 5324 Commercial and Industrial Machinery and Equipment Rental and Leasing
- 533 Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)
- 5331 Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)

## **PROFESSIONAL, SCIENTIFIC, TECHNICAL & MANAGEMENT SERVICES**

- 541 Professional, Scientific, and Technical Services
- 5411 Legal Services
- 5412 Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- 5413 Architectural, Engineering, and Related Services
- 5414 Specialized Design Services

5415	Computer Systems Design and Related Services
5416	Management, Scientific, and Technical Consulting Services
5417	Scientific Research and Development Services
5418	Advertising and Related Services
5419	Other Professional, Scientific, and Technical Services
551	Management of Companies and Enterprises
5511	Management of Companies and Enterprises

## **ADMINISTRATIVE & SUPPORT & WASTE SERVICES**

561	Administrative and Support Services
5611	Office Administrative Services
5612	Facilities Support Services
5613	Employment Services
5614	Business Support Services
5615	Travel Arrangement and Reservation Services
5616	Investigation and Security Services
5617	Services to Buildings and Dwellings
5619	Other Support Services
562	Waste Management and Remediation Services
5621	Waste Collection
5622	Waste Treatment and Disposal
5629	Remediation and Other Waste Management Services

## **HEALTH SCIENCES & SERVICES**

3254	Pharmaceutical and Medicine Manufacturing
3391	Medical Equipment and Supplies Manufacturing
5417	Scientific Research and Development Services
6211	Offices of Physicians
6212	Offices of Dentists
6213	Offices of Other Health Practitioners
6214	Outpatient Care Centers
6215	Medical and Diagnostic Laboratories
6216	Home Health Care Services
6219	Other Ambulatory Health Care Services
6221	General Medical and Surgical Hospitals
6222	Psychiatric and Substance Abuse Hospitals
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals
6231	Nursing Care Facilities
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities
6233	Community Care Facilities for the Elderly
6239	Other Residential Care Facilities
6242	Community Food and Housing, and Emergency and Other Relief Services
6243	Vocational Rehabilitation Services
8122	Death Care Services

## **ENTERTAINMENT & TOURISM – URBAN REGIONS**

512	Motion Picture and Sound Recording Industries
711	Performing Arts, Spectator Sports, and Related Industries
712	Museums, Historical Sites, and Similar Institutions
713	Amusement, Gambling, and Recreation Industries
721	Accommodation

## **ENTERTAINMENT & TOURISM – RURAL REGIONS**

711	Performing Arts, Spectator Sports, and Related Industries
712	Museums, Historical Sites, and Similar Institutions
713	Amusement, Gambling, and Recreation Industries
721	Accommodation
722	Food Services and Drinking Places

## **OTHER SERVICES (EXCEPT PUBLIC ADMINISTRATION)**

811	Repair and Maintenance
8111	Automotive Repair and Maintenance
8112	Electronic and Precision Equipment Repair and Maintenance
8113	Commercial and Industrial Machinery and Equipment
8114	Personal and Household Goods Repair and Maintenance
812	Personal and Laundry Services
8121	Personal Care Services
8122	Death Care Services
8123	Drycleaning and Laundry Services
8129	Other Personal Services
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations
8131	Religious Organizations
8132	Grantmaking and Giving Services
8133	Social Advocacy Organizations
8134	Civic and Social Organizations
8139	Business, Professional, Labor, Political, and Similar Organizations
814	Private Households
8141	Private Households

## **ALL GOVERNMENT**

Federal Government
Department of Defense
Other Federal Government
State Government
State Government Education
Other State Government
Local Government
Local Government Education
Other Local Government



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